SUMMARY OF CHANGES

Remove Page	Insert Page	Explanation of Changes
1-1	1-1	Provides new version number; date of current update
1-2 through 1-6	1-2 through 1-6	Revised Table of Contents
3.1-8	3.1-8	Revised Job Code Request Form
3.1-12 through 3.1-13	3.1-12 through 3.1-13	Changed DOE Order reference. Added more critiera regarding those who file Executive Disclosure.
3.2-19	3.2-19	A note was added under How to Verify an Address.
4.2-5	4.2-5	Deleted Type of Appointment Code 34
5.23-1 through 5.23-2	5.23-1 through 5.23-2	Added information on LEI Dates
6.3-2	6.3-2	Added information on LEI Date changes
8.1-1 through 8.1-3	8.1-1 through 8.1-3	Revised information on Corrections
8.2-2	8.2-2	Changed information regarding Remarks
10.1-28	10.1-28	Sample Awards Report Change, adding effective date
10.1-51	10.1-51	Changes to Organization Position Title Report Generation
10.1-52 through 10.1-56	10.1-52 through 10.1-56	Page numbers changed
12.2-1	12.2-1	Changed name of query to: **N_MassPOIChg_MassReorg_Request**
12.4-1	12.4-1	Corrects Mass Ratings Request information Request to reflect that requests must be for groups of more than 15 employees
12.5-1	12.5-1	Corrects Mass Ratings With Awards Request to reflect that requests must be for groups of more than 15 employees
12.6-1	12.6-1	Corrects Mass Cleanup “Reports To” to reflect that the processing in mass must be for more than 15 employees.
	12.7-1	Added Mass Personnel Office Identifier (POI) Change (NOA Code 800) section
14.24-1	14.24-1	Deleted Type of Appointment Code Type 34
15-1	15-1	Updated Table of Contents page for Section 15
15.2-1	15.2-1	Revised User Account information

CHRIS HR USERS' MANUAL

Version 4.4 September 2003
Updated June/2004

CORPORATE HUMAN RESOURCE
CHRIS
INFORMATION SYSTEM

Based on PeopleSoft Version 8.0

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Job Code Request Form

Complete form (except for last two grayed columns) and fax to the CHRIS Functional Hotline at (304) 285-0902.

Effective Date of Action Needing New Job Code	New Job Code	Occu Series	Title	Pay Plan	Pay Table	Grade	Manager Level	FLSA Status	Sub Agency	POI	Pay Basis	Func Class	Sensitivity	Spc Gvt Emp Subject to Exec Disc ? (Y/N)*	Sch C (Y/N)	CHRIS Functional Staff Only	
																Ex Disc [278] (Y/N)	Fin Int [450] (Y/N)

Today's Date: ______________________________

Requestor Name: ______________________________

Sub-Agency Name: ______________________________

E-Mail Address: ______________________________

Requestor Phone Number: ______________________________

Requestor Fax Number: ______________________________

*** Special Government Employees (Experts, Consultants, Advisory Committee Members in Pay Plans ED, EE, EF, EG, EH, and EI) are subject to Executive Disclosure if their salary is equal to or greater than 120% of GS-15, Step 1. Otherwise, they are subject to Employee Financial Interests. The on-line job code form is available on the CHRIS website at http://chris.inel.gov/HR_Admin/job_code.cfm and should be used to ensure accuracy and completeness of the information provided.**

There are some positions for which there will be no clear rule to determine FLSA based on pay plan, grade or supervisory status. This must be determined at each individual site.

Sub-Agency	Two character code for your specific site
POI	Personnel Office Identifier (4 - 6 digits)
Pay Basis	e.g., Per Annum (PA), Per Hour (PH), Per Day (PD)
Func Class	Functional Classification code *00* = Not applicable Use the following codes for scientific and engineering positions only: *11* = Research *12* = Research contract and grant administration *13* = Development *14* = Test and evaluation *21* = Design *22* = Construction *23* = Production *24* = Install/Operations/Maint *31* = Data collection, processing & analysis *32* = Scientific and technical information *41* = Standards and specifications *42* = Regulatory enforcement and licensing *51* = Natural resource operations *81* = Clinical practice, counseling, and ancillary medical services *91* = Planning *92* = Management *93* = Teaching and training *94* = Technical assistance and consulting *99* = Other - Not elsewhere classified
Senitivity	Position Sensitivity *1*- Non Sensitive *2*- Non-critical, Sensitive *3* - Critical Sensitive *4* - Special Sensitive *5* - Moderate Risk *6* - High Risk
Fin Interest*	Financial Interest (system-generated): Determine if the employee should complete the Annual Confidential Financial Disclosure Report. * Refer to DOE Order N326.xx issued in September each year.

Exec Disc	Executive Disclosure (system-generated): • All employees in Pay Plans EX, ES, SL, ST, CA, AL are subject to Executive Disclosure. • All employees in Pay Plans EJ, EK, and EN in grade level 05 (Pay Band V) are subject to Executive Disclosure. • All Schedule C employees are subject to Executive Disclosure. • Special Government Employees (Experts, Consultants, Advisory Committee Members in Pay Plans ED, EE, EF, EG, EH, and EI) are subject to Executive Disclosure if their salary is equal to or greater than 120% of GS-15, Step 1. Otherwise, they are subject to Employee Financial Interests.
	-OR-
Sch C	Schedule C Appointments -- CHECK ONLY IF EMPLOYEE IS ON A SCHEULE C APPOINTMENT

When the CHRIS Functional Hotline receives the request, the new job code will be assigned and the form will be returned with the newly assigned job code.

How to Verify an Address

Administer Workforce > Administer Workforce (USF) > Inquire > Personal Data

1. Enter **Emplid** of employee whose address you are verifying.
2. View address. No changes can be made because CHRIS is no longer the system of record for addresses.

Note: CHRIS is not the official system of record for address information. Contact your payroll representative for information on address changes.

How to Enter Emergency Contact Information

Administer Workforce > Administer Workforce (USF) > Use2 > Emergency Contact

🗀Contact Address/Phone

1. Select employee.
2. Enter **Contact Name**.
3. Enter **Relationship to Employee**.
4. Check **Primary Contact** box if applicable.
5. Check **Same Addr/Home Phone as EE** box, if applicable. Once box is checked address information will autopopulate for the employee's record.

🗀Other Phone Numbers

1. Enter **Phone Type**. If more than one **Phone Type**, insert row (+).
2. Enter **Phone**.
3. Save.

Relationship Edits Between NOA Code, Type Appt, Posn Occupied, and Tenure

Edits are in place to ensure that the appropriate relationship is established between NOA Code, Type Appt, Posn Occupied, and Tenure for NOA Code 1XX and 5XX actions. The matrix table below shows the allowable combinations.

	Position Page	**Position Page**	**Employment 2 Page**
If NOA Code is:	**Then Type Appt must be:**	**And Posn Occupied must be:**	**And Tenure must be:**
124, 524	20	1	3
112	20	1	3
101, 141, 501, 541	15	1	2
100, 500, 130, 140, 540	10 or 15	1	1 or 2
115, 122, 515, 522	20	1	0
108 or 508	20	1	3
142, 143, 145, 542, 543	50	3 or 4	0
146, 147, 546	55	3 or 4	0
148, 548	60	3 or 4	0
149, 549	65	3 or 4	0
170, 570	30, 32, 36, 38, 40, 42, 44, 46, or 48	0, 2, or 3	0, 1, 2, or 3
171, 571	40, 42, 44, 46, or 48	2	0 or 3
107, 507	20	1	3
120, 520	20	1	3
190, 590	20, 40, 42, 46, or 48	1 or 2	0 or 3

If one or more of these fields are incompatible, an error message will appear indicating that the discrepancy(s) must be resolved before the action will save.

5.23 Non SF-50 Change/Correction -NOA Code - 966

Important: This action is only used for changing/correcting data elements that *DO NOT appear on a SF-50*. All data elements that appear on the SF-50 will be grayed out when this NOA Code is selected. Verify whether this change/correction will effect the SF-50; if so, a NOA Code “002” correction will need to be processed. If data you are changing/correcting effects the position, you must first make the appropriate change/correction on the position data by inserting a new row.

DO NOT CHANGE THE LEI DATE WHEN PROCESSING A 966 ACTION TO PROJECT THE WGI DUE DATE DUE TO EXCESS LWOP. The LEI Date should reflect the last equivalent increase that the employee received (last WGI, last promotion). Generally, you would only manually change the LEI date when someone is changed to lower grade after serving a temporary promotion (to reflect the date of the last equivalent increase employee received while in their permanent position); when someone is converted from a pay plan that didn’t have a WGI waiting period; when making a temporary promotion permanent; or when gaining employees from other agencies when the LEI may need changed from the hire date to the employee’s actual LEI that had been earned while in the previous agency (last WGI, last promotion).

Note: If the action you are entering is an intervening action, you must be in correction mode to insert remarks or change tracking data.

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action** – **Data Change**.
5. Select **Reason Code**.
6. Enter the **NOA Code**- 966.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.
2. **Remarks** *MUST* be entered indicating the changes made to the record.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in Block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.

    c) Uncheck the **Action Dt Ovrd** box.

2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in Block 50 of the SF-50. To change (if necessary):
    a) Check the **Override Operator Emplid** box.
    b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Review each page and make necessary change/changes. If changing/correcting an SCD, refer to "*Using SCD Calculator*" under "*Basic Operations/Functions*."

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**.
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

Compensation

1. Review/Change **Pay Rate Determinant**.
2. If employee is on retained grade or pay, enter applicable information.

Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row in the **Earnings Code** field.

Accounting Info

1. Review/Change Appropriation Code in the **Account** field.

Employment 1

1. Enter LEO SCD if applicable.
2. The **Pay Chg Dt** will autopopulate with the effective date of the action unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior non-canceled row.
3. Review/Change **LEI Date**. Generally you would only manually change the LEI date when someone is changed to lower grade after serving a temporary promotion (to reflect the date of the last equivalent increase employee received while in their permanent position).

Employment 2

1. Review/Change/Enter **Retained Grade Expires** dates as appropriate. **NOTE:** **Retained Grade Expiry Date** should be entered one day less than the **Retained Grade Begin Date**. *Ex: Retained Grade Begin Date is 12-12-1998, then Retained Grade Expiry Date should be 12-11-2000.*
2. Review/Change **Permanent Data RIF**. Note: Should be the same as the position data record unless the employee is on a temporary promotion.

Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**.
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

NOTE: *Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.*

8.1 Correction

NOTE:

1. Use this procedure to correct official OPM actions as well as 9XX actions.

2. **NOA Code 002 can NEVER be used to correct an action with an incorrect NOA Code. You must process a NOA Code 001, Cancellation, to cancel the action with the incorrect NOA code and then re-enter the action using the correct NOA Code.** *Corrections can only be processed on actions in "PRO" PAR Status. Corrections can only be processed on items previously entered in CHRIS. To correct historical actions (not processed in the CHRIS database) see Section 13, Web Applications.*

   If this correction involves changes in Position Data such as: ***Grade, Title, Series, Location, Department, Work Schedule, Position Occupied, Standard Hours, Bargaining Unit, etc.,*** *you must refer to the section on "Modifying a Position" under "General Procedures."*

3. NOA Code 002 can NEVER be used to correct an Effective Date. You must cancel the action with the incorrect Effective Date and re-enter the action with the correct Effective Date.

4. For more information on refreshes, see the section entitled *"Action Refreshes."*

5. Always enter remarks that fully explain what item(s) of the employee's record is being corrected. Check the *Guide to Processing Personnel Actions* for the appropriate types of remarks. Remarks enable Payroll to correctly identify what needs to be changed and how to proceed with the 002 or 966 action.

   Review the following before processing Corrections:

   - The following data elements can be corrected from the most recent ***permanent*** action on which the error appears: Date Of Birth; Name; Position Number; Veterans Preference; Veterans Preference for RIF; Service Computation Date [Leave]; Bargaining Unit Status; Position Occupied Code; Fund type/BR code; FLSA Category; and Tenure. **Note:** It is important to remember that when you are correcting one of these data elements that you make sure that you correct the most recent **permanent** action AND any non-permanent actions above it. The permanent action is the one that must be filed on the right side of the OPF and for that reason, it must be corrected. Remember to include remarks which state that this correction corrects actions from (date) to (date). Otherwise, there will be no record of the correction in the OPF. Non-permanent actions above the most recent permanent action must be corrected also so that future actions pick up the change in the data element. All other data elements that appear on the SF-50 must be corrected by processing a NOAC 002-Correction for every SF-50 on which the error appears. Like all other NOAC 002's, it is imperative to enter a remark in order to explain what is being corrected.

- Process NOAC 002-Correction to 9XX actions when incorrect data appear on these actions. NOAC 9XX actions will no longer be refreshed by the CHRIS Functional Hotline unless the refresh is completed the same day the action is entered or changed to a PAR Status of COR or PRO and before the action has been transmitted to Defense Civilian Payroll System (DCPS).

- If it is necessary to process an intervening action, the actions that have already been processed with an effective date greater than the effective date of the intervening action will have incorrect data. If the new intervening action impacts data that appears on the SF-50 of these later actions, all of these later actions must be corrected. NOAC 002-Correction actions should be completed the same day as the intervening action to ensure that all of these actions are transmitted to the Defense Civilian Payroll System (DCPS) on the same day.

- Never process a NOAC-002-Correction to an award or bonus action to correct any salary field. This includes Basic Pay, Locality/LEO Adjustment, Adjusted Basic Pay, Total Pay and Other Pay such as Retention Allowance, Availability Pay, AUO, etc. NOAC 002-Correction actions must be processed to correct all other fields that appear on the SF-50 for awards and bonuses.

- If a NOAC 002-Correction action is processed, changes can also be made to data fields that do not appear on the SF-50. For example, if you process an intervening NOAC 893 Within-Grade Increase (WGI) and you need to process a NOAC-002 Correction to actions already in CHRIS with an effective date later than the intervening action, you should also change the LEI Date on all of these Correction actions. If changes to non-SF-50 data elements are made, use Remark Z05 to explain the changed data, in addition to any standard OPM remarks, as required.

- When multiple NOAC 002-Correction actions are processed, it is **essential that these correction actions are processed in chronological order with the oldest action being corrected first and the most recent action last**. Review the employee's Official Personnel Folder, identify the actions that have incorrect data, identify any other data fields in CHRIS that are incorrect but do not appear on the SF-50, and then complete NOAC 002-Correction actions.

- In some cases, it will be necessary to refresh salary information on NOAC 002-Correction actions. For example, an employee had a promotion that was already in CHRIS when the retroactive NOAC 895-Locality Payment was processed and that Promotion already had a NOAC 002-Correction action to correct salary fields. When the second Correction action is processed, the new NOAC 002-Correction is inserted on top of the initial action and data fields are copied forward from that action. The second Correction will reflect the salary before the new locality percentages were implemented, unless salary information is refreshed even though the first NOAC 002-Correction has correct salary information.

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Correction

🗀Data Control

1. Select Employee.

2. Scroll to the action you want to correct; verify the **Effective Date**. If there are other 002 Correction Actions for that action, insert the current Correction Action on top of the most recent of the existing 002 Correction Actions.
3. Insert a row (+).
4. **PAR Status** defaults to *COR*.

PAR Remarks

1. Press (+) to insert **Remarks** or (-) to delete **Remarks**.
2. Use the < or > arrows to view **Remarks**.
3. You must delete old remarks, and then enter appropriate remarks for the correction.
4. Be sure to include a remark stating what has been corrected.

Tracking Data

1. Enter the current date in the **Action Taken date** block. The **Action Taken date** appears in Block 49 of the SF-50.
2. Enter the **Emplid** of the PAR approving official for your sub-agency in the **Emplid of Tracking Row** block. The **Emplid of Tracking Row** appears in Block 50 of the SF-50.

Job- Any ***changes that affect position must be made in Manage Positions first.***

1. If changes were made under Manage Positions:
   a) Delete the **Position**.
   b) Tab - this will remove prior position information.
   c) Enter the **Position** (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
   d) Tab - this will refresh with new position information.

Compensation

1. Review/Change **Pay Rate Determinant** if applicable.
2. Enter **Step** if this Correction affects position data.

Employment 1

1. Change necessary data fields. See information on "*Using SCD Calculator*" under "*Basic Operations/Functions*."

Employment 2

1. Change necessary data fields.

Return to Data Control

1. Save **-** Read the message. You must review records affected by changes and check the Review Performed Flag before saving.
2. If you are correcting an action that is ***not*** the most recent action, a message will direct you to review records affected by the changes and check the **Review Performed Flag** on the Data Control Page before you save the action.
3. Use the right-hand scroll bar to review subsequent actions. On each record you must check the Review check box in the upper right hand corner before saving. See section entitled "*Understanding Reviewed Flag*" under "*Basic Operations/Functions*" for an explanation of **Reviewed Flag**.
4. Scroll back to the Correction Action.
5. Save.

3. You can ***NEVER*** insert a row on a canceled row.
4. Click on **PAR Status** and change to **CAN**.
5. Enter **Authority #1** and/or **Authority #2** if applicable.
6. If you are canceling an action that is ***not*** the most recent action, a message will direct you to review records affected by the changes and check the **Review Performed Flag** on the Data Control Page before you save the action.
7. Save.

PAR Remarks

1. Press (+) to insert **Remarks** or (-) to delete **Remarks**.
2. Use the < or > arrows to view **Remarks**.
3. You must delete old remarks, and then enter appropriate remarks for the cancellation.

Tracking Data

1. Enter the current date in the **Action Taken date** block. The **Action Taken date** appears in Block 49 of the SF-50.
2. Enter the Emplid of the PAR approving official for your sub-agency in the **Emplid of Tracking Row** block. The **Emplid of Tracking Row** appears in Block 50 of the SF-50.

NOTE*: If this is not the most recent action being canceled, you will need to cancel/correct each subsequent action.*

```
                                    U.S. DEPARTMENT OF ENERGY
Report ID: NRHR015                        AWARDS REPORT                      Page No. 5
                              National Energy Technology Laboratory          Run Date 07/09/2004
                                From 01-JAN-2004  Thru 26-JUN-2004           Run Time 10:59:58

                           Amount in Dollars   Amount in Hours   Empl Status   Eff Date
                           =================   ===============   ===========   ===========
```

SAMPLE

Generating An Organization Position Titles Report

The **Organization Position Titles** report is a list of all **Organization Position Titles**. To generate this report:

Develop Workforce > Manage Positions (USF) > DOE Report > Organization Position Titles Report

1. Select **Organization Position Titles Report**.
2. Click on **Add a New Value**.
3. **Run Control ID** – ORGPSNRPT.
4. Click **Add** - You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "ORGPSNRPT."
5. Click on **Save**.
6. Click on **Run**.
7. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
8. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
9. Click **OK**.
10. Record the process instance number.
11. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View**.
12. Maximize the **Report/Log Viewer** page.
13. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
14. Adobe Acrobat will open.
15. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."

Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Report ID: NRHR020

Organization (Working) Position Titles

Page No. 1
Report Date: 11/17/2003
Report Time: 1:13:25PM

SAMPLE

Occupational Series	**Organization Position Title Code**	**Organization Position Title**	**Effective Date**
0018	0001	Director, Environment, Safety & Health Evaluations	1/1/1900
0018	0006	Director, Environment, Safety & Health Residents	1/1/1900
0018	0002	Director, Risk Analysis & Technology	1/1/1900
0018	0008	Lead Safety & Occupational Health Manager	1/1/1900
0018	0003	Nuclear Standards & Procedures Systems Expert	1/1/1900
0018	0004	Safety & Occupational Health Manager	1/1/1900
0018	0005	Safety & Occupational Health Specialist	1/1/1900
0018	0007	Safety Specialist	1/1/1900
0018	0009	Supervisory Safety & Occupational Health Specialist	1/1/1900
0019	0001	Safety Technician	1/1/1900
0020	0001	Community Planner	1/1/1900
0023	0001	Outdoor Recreation Planner	1/1/1900
0028	0016	Deputy Assistant Secretary for Environment	1/1/1900
0028	0001	Deputy Assistant Secretary, Environment	1/1/1900
0028	0002	Deputy Director, Environment, Safety & Health Evaluations	1/1/1900
0028	0014	Dir, Ofc of National Environmental Policy Act (NEPA) Pol & Compli	1/1/1900
0028	0009	Director, Environmental Guidance	1/1/1900
0028	0003	Director, Environmental Policy & Assistance	1/1/1900
0028	0008	Director, NEPA Oversight	1/1/1900
0028	0004	Director, NEPA Policy & Assistance	1/1/1900
0028	0013	Director, Office of Environmental Policy & Guidance	1/1/1900
0028	0005	Environmental Protection Specialist	1/1/1900
0028	0011	Executive Assistant	1/1/1900
0028	0012	Lead Environmental Protection Specialist	1/1/1900
0028	0006	Principal Dep Asst Secretary, Environment, Safety & Health	1/1/1900
0028	0015	Special Assistant for Compliance	1/1/1900
0028	0007	Supervisory Environmental Protection Specialist	1/1/1900
0028	0010	WAG Manager	1/1/1900
0029	0003	Environmental Assistant	1/1/1900
0029	0002	Environmental Protection Assistant	1/1/1900
0029	0001	Environmental Technician	1/1/1900
0030	0830	Document Control Analyst (Leader)	1/1/1900
0080	0024	Chief, Personnel Security Branch	1/1/1900
0080	0025	Chief, Physical Security Branch	1/1/1900
0080	0039	Cyber Security Specialist	1/1/1900
0080	0029	Dep Assoc Dep Asst Sec Technical & Environmental Support	1/1/1900
0080	0064	Deputy Director	1/1/1900
0080	0048	Deputy Director, Office of Emergency Operations	1/1/1900

Generating A Vacant Position Report

The **Vacant Position** report is a list of all **Vacant Positions** within your *Sub-Agency*. To generate this report:

Develop Workforce > Manage Positions (USF) > DOE Report > Vacant Position Report

1. Select **Vacant Position Report**.
2. Click on **Add a New Value**.
3. **Run Control ID** – VACPSNRPT.
4. Click **Add** - You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "VACPSNRPT."
5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
6. Enter **Department** or **Departments** for which you wish to generate report. You can enter the ten-digit code if you know it or click on the magnifying glass and select them from the list available. To add more than one **Department**, press (+) to add a row for the next **Department**. Follow this procedure until you have selected each **Department** you wish to report on. If you do not select a specific **Department** for the sub agency entered, then all **Departments** for that sub agency will print.
7. If you try to select a **Department** without entering a sub agency, the system will give you an error of "*No records found matching specified key(s).*" Therefore, you must enter or select a **Sub-Agency** or select a specific **Department**.
8. Click on **Save**.
9. Click on **Run**.
10. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.
11. Verify under **Process List** that the **Type**: Web and **Format**: PDF.
12. Click **OK**.
13. Record the process instance number.
14. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View**.
15. Maximize the **Report/Log Viewer** page.
16. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
17. Adobe Acrobat will open and you should print your report from there.

```
                                     DEPARTMENT OF ENERGY                         Page No. 2
                                      CHIO FIELD OFFICE                           Run Date: 12/04/2003
Report ID:  NRHR012                    SUB-AGENCY:  OH                            Run Time: 14:52:58
                                       VACANT POSITIONS

LAST          LAST                                                                                 POSITION
INCUMBENT     INCUMBENT           POSITION                  PAY   OCC          JOB   POSITION FULL/ STATUS
EMPLID        NAME                TITLE                     PLAN  SERIESGRADE  CODE  NUMBER   PART  DATE
```

SAMPLE

Generating A Pay Plan EN WGI/Trial Period Report

The **EN WGI/Trial Period** report is used to print a listing of employees who were converted to pay plan "EN" within a particular date range. In order to generate this report:
Define Business Rules > Manage Human Resources (USF) > DOE Report > EN WGI/Trial Period Report

1. Click on "Add a New Value."

2. **Run Control ID** – ENWGI/Trial.

3. Click **Add** - You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "ENWGI/Trial."

4. Enter the **Start Date** for which you wish to generate the report. ***Note: Date Range should include the date of hire or the date that the employee was converted to Pay Plan EN.***

5. Enter the **End Date** for which you wish to generate the report.

6. Click on **Save**.

7. Click on **Run**.

8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT.

9. Verify under **Process List** that the **Type**: Web and **Format**: PDF.

10. Click **OK**.

11. Record the process instance number.

12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View**.

13. Maximize the **Report/Log Viewer** page.

14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.

15. Adobe Acrobat will open.

16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting "Portrait" or "Landscape" orientation or selecting "Shrink oversized pages to paper size."

17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

```
Report ID: NRHR058                        U.S. DEPARTMENT OF ENERGY                  Page No. 1
                                      EN PAY PLAN WGI/TRIAL PERIOD REPORT            Run Date: 11/17/2003
                                       From 01-JAN-2002 Thru 10-NOV-2003             Run Time: 12:58:23

SUB-AGENCY:XE    National Nuclear Security Administration


                                                                        PAY
DATE           NOA - R E A S O N                   EMPLID NAME          PLN     Comprate Adj     Total
--------------------------------------------------------------------------------------------------------

06/02/2002     570 Conv to Exc Appt
06/02/2002     570 Conv to Exc Appt
06/02/2002     570 Conv to Exc Appt
06/02/2002     570 Conv to Exc Appt
06/02/2002     570 Conv to Exc Appt

          TOTAL Employees FOR SUB-AGENCY




                                                     End of Report
```

SAMPLE

12.2 Organization Title Changes (NOA Code 929)/ Realignments (NOA Code 790)

Generating A Crosswalk Query for Use in Requesting Mass Organization Name Changes or NOA Code 790 Realignment Action

Once the CHRIS Functional Staff is notified by Tom Wheeler of an approved reorganization you will be notified via e-mail to generate a crosswalk of changes for use in processing mass actions.

The e-mail will include a copy of the approval memo from Tom Wheeler, and a request for necessary information to prepare for the requested changes. Within the e-mail we will ask for verification of the effective date proposed by T. Wheeler, and what verbage will be used for the required UNM on mass realignment (NOA Code 790) actions. Upon receipt of this e-mail, it is very important that you develop a crosswalk of all employees affected by the change.

Using your Query Site ID, run the query **N_MassPOIChg_MassReorg_Request**. The query will prompt you for a full or partial Department ID.

- If the reorganization affects all departments within your subagency or several departments that are distinguishable by the first few digits of the department ID, you can enter a partial department ID such as 726%. This would generate a report with all departments that start with 726.

- If the reorganization affects only one department within your subagency you can enter the complete Department ID, or as many characters as are required to distinguish it from all other department IDs. This will generate a report of only the department requested.

The query will include the following criteria: Department ID, Department, Name, Position Number, Jobcode, and Emplid.

When the need arises for use of this report, it is important that you **do not** delete or remove any employees from the report. In order for the CHRIS Staff to process the mass actions, you will need **only** to add an additional column at the end of the spreadsheet labeled **New Department**. For each employee listed, enter one of the following in the New Department column: No Change, Reassignment (this means that you will be processing a manual action to reassign this employee as part of the reorganization), or the **new** department id to which the employee is being realigned. If the reorganization involves a change in department name, enter “929” in the New Department column.

12.4 Mass Ratings

REQUESTING/PROCESSING MASS PERFORMANCE RATING UPDATES

Performance ratings for groups of more than 15 employees can be processed in mass by submitting a specially formatted Excel spreadsheet with required information to the CHRIS Functional Hotline. HR Offices must follow the steps below to request/submit mass processing.

Requesting Mass Performance Ratings (Without Awards)

Step 1: Logon on to CHRIS using your site's query ID and password.

Step 2: Path: **PeopleTools > Query Manager > Use > Query Manager**. Type N_Mass in the "Search For" field and click on the Search button to generate a list of mass action queries. In the resulting query list, click on the "**Run**" hyperlink for N_MASS_APPRAISAL_CANDIDATES to generate a list of your employees.

Step 3: Click on the hyperlink for 'Download results in : an Excel Spreadsheet' to run the report to EXCEL. On the File Download page, select "Open this file from its current location" and click on OK. If you see an 'Open With' window, choose MicroSoft Excel as the program you want to use.

Step 4: You will receive a prompt box to enter:

- ReviewDate
- ReviewFrom
- ReviewTo

If you enter these dates the corresponding columns will populate on the spreadsheet. You may choose to leave one or more of these date columns blank. If these dates are not entered in the prompt box, the spreadsheet will generate without information in these columns.

The following data fields will be included in the EXCEL report: POI, SA, Emplid, NID, Name, Deptid, Pay Plan, Old Rvw Date, New Rvw Date, Review From, Review To, Rating Pattern, and Perf Rating.

Step 5: The spreadsheet will contain the most recent performance information from CHRIS in the Rating Pattern and Perf Rating columns. The new rating information must be reflected in these columns when your spreadsheet is sent to the CHRIS staff for processing. If your office uses Pattern "A" (pass/fail), and your pattern has not changed during the period, very few changes will need to be made to these columns. If your office uses other than a Pattern of "A" (pass/fail), you should clear the Perf Rating column (except the column header) immediately to ensure that the old level is not confused as the new level.

Step 6: Complete/revise the following columns before sending your spreadsheet(s) to the CHRIS staff for processing. **If you need to make changes to the performance date columns referenced below, these columns must be reformatted in "Text" format before changes are made.** Highlight the columns. From the EXCEL menu select: Format/Cells/Number Tab/Text.

New Rvw Date: Enter the new Date (Format: YYYY-MM-DD)
Review From: Enter the beginning date of the period (Format: YYYY-MM-DD)
Review To: Enter the ending date of the period (Format: YYYY-MM-DD)

12.5 Mass Ratings With Awards

REQUESTING/PROCESSING MASS PERFORMANCE RATING UPDATES WITH AWARDS

Performance ratings with award actions can be processed in mass for groups of more than 15 employees by submitting a specially formatted Excel spreadsheet with required information to the CHRIS Functional Hotline. HR Offices must follow the steps below to request/submit mass processing. **Lead time is needed to process these awards; therefore, the CHRIS Functional Team needs to receive the spreadsheets 2-3 days before the Friday before the effective date of the award. Otherwise, the action may be delayed a pay period.**

Requesting Mass Performance Ratings With Awards

Step 1: Logon on to CHRIS using your site's query ID and password.

Step 2: Path: **PeopleTools > Query Manager > Use > Query Manager**. Type N_Mass in the "Search For" field and click on the Search button to generate a list of mass action queries. In the resulting query list, click on the "**Run**" hyperlink for N_MASS_PERFAWARDS_CANDIDATES to generate a list of your employees.

Step 3: Click on the hyperlink for 'Download results in : an Excel Spreadsheet' to run the report to EXCEL. On the File Download page, select "Open this file from its current location" and click on OK. If you see an 'Open With' window, choose MicroSoft Excel as the program you want to use.

Step 4: You will receive a prompt box to enter:

- ReviewDate
- ReviewFrom
- ReviewTo

If you enter these dates the corresponding columns will populate on the spreadsheet. You may choose to leave one or more of these date columns blank. If these dates are not entered in the prompt box, the spreadsheet will generate without information in these columns.

The following data fields will be included in the EXCEL report: POI, SA, Emplid, NID, Name, Acct Code, Deptid, Pay Plan, Grade, Step, Base Pay, Wrk Sched, Hire Date, Last Promo Date, Old Rvw Date, Awd Amt, Awd Hrs, New Rvw Dt, Review From, Review To, Rating Pattern, Perf Rating, and Mgr Level.

Step 5: The spreadsheet will contain the most recent performance information from CHRIS in the Rating Pattern and Perf Rating columns. The new rating information must be reflected in these columns when your spreadsheet is sent to the CHRIS staff for processing. If your office uses Pattern "A" (pass/fail), and your pattern has not changed during the period, very few changes will need to be made to these columns. If your office uses other than a Pattern of "A" (pass/fail), you should clear the Perf column (except the column header) immediately to ensure that the old level is not confused as the new level.

Step 6: Complete/revise the following columns before sending your spreadsheet(s) to the CHRIS staff for processing. **If you need to make changes to the performance date columns referenced below, these columns must be reformatted in "Text" format before changes are made.** Highlight the columns. From the EXCEL menu select Format/Cells/Number Tab/Text.

12.6 Mass Cleanup "Reports To"

PROCEDURES FOR REQUESTING MASS CORRECTIONS/UPDATES TO "REPORTS TO POSITION" AND "SUPERVISOR ID"

Mass processing capability is available to correct/update "Reports to Position" and "Supervisor ID" information. Two different processes will be used to make these changes. Existing Position Data records and personnel transactions may be updated or new rows of data may be inserted, depending on the effective date of the requested changes and the effective date of the employee's most recent position and personnel transactions. These processes will update records for active positions and active employees only.

"Reports to" Cleanup

This process will be used to update "Reports to" information on both the Position Data and personnel transactions for an entire subagency, or for a portion of a subagency. It provides a feature to identify "included" or "excluded" Department ID's within a given subagency. These updates will be based solely on the Department Manager's position identified in the Department Table.

"Reports to" Changes

This process will be used to update/change "Reports to" information on both Position Data and Job records when the process involves more than 15 employees and (1) there are multiple supervisors within a Department ID, (2) there is a different supervisor other than the one identified in the Department Table, or (3) there are only selected employees or positions within a Department ID to be changed/updated.

To request mass processing to "Reports to" information:

1. Print the following reports from CHRIS using the following path:

   Define Business Rules > Manage Human Resources > DOE Reports

   (You may also request these reports in EXCEL format by calling the CHRIS Functional Hotline (304) 285-1310)) or sending an e-mail to CHRISFunctional@netl.doe.gov.)

   - Department Managers Report
   - "Reports to" Report
   - "Reports to" Differences

   Develop Workforce > Manage Positions > DOE Reports

   - Vacant Positions Report

2. Carefully review the Department Managers Report. Using a black pen, annotate the report with the name, position number, and the effective date the supervisor entered the supervisory position for any required revisions. Fax the changes to the CHRIS Functional Hotline at (304) 285-0902. Once these corrections are made to the "Manager's Position" in the Department Table by the CHRIS staff, the "Reports to Position" number will

12.7 Mass Personnel Office Identifier (POI) Change (NOA Code 800)

REQUESTING MASS POI PROCESSING

There is a mass process in CHRIS that will generate NOAC 800, "Change in Data Element" actions to change the POI. To request a mass POI change the gaining personnel office must email the CHRIS Functional Staff at CHRISFunctional@netl.doe.gov and provide, by e-mail or fax (304-285-0902), a copy of the Memorandum of Agreement (MOA) that authorizes the change in POI and provides the proposed effective date of the change. A Mass POI Change is appropriate when personnel authority is transferred from one office to another, i.e., when a personnel office is gaining the authority to appoint and separate employees; prepare personnel actions; maintain official personnel records; and administer program for staff compensation, training and development, benefits and awards, and employee/labor relations; of another personnel office with the Department. In these cases, the POI of the losing personnel office must be changed to the POI of the gaining personnel office with the NOAC 800, "Change in Data Element."

Lead time is needed to process actions; therefore, the CHRIS Functional Team needs to receive the spread-sheet the Friday prior to the effective date of the change. Otherwise, the action may be delayed a pay period.

POI Determination

The CHRIS Functional Staff will help the gaining office determine whether to use the gaining offices existing POI or to use the gaining offices existing POI plus an added alpha character.

Rule of Thumb

If the losing office is being changed to the same POI as the gaining office then the losing office must also change their Sub-Agency code to the gaining office's Sub-Agency code. This change in Sub Agency code is accomplished via the same NOAC 800 action. If the gaining office chooses to add an alpha character to their POI for the change then the losing office can continue to use their current Sub Agency code.

Example: If Richland Operations Office, Sub-Agency RL, POI 1953, would gain the personnel authority for the Ohio Field Office, Sub-Agency OH, POI 4298, they could be changed to the current Sub-Agency/POI of RL-1953 or they could changed to OH-1953A.

Supporting Data

If an entire POI is changing, this should be stated on the requesting e-mail. If only selected organizations within that POI are changing while other organizations will remain in that POI, then a crosswalk will be needed. The CHRIS HR Functional Staff will provide a crosswalk to the gaining personnel office, unless the gaining office can access the losing office's data. When the gaining office has access to the losing office's data then the gaining office can provide the crosswalk with the changes identified.

To create your crosswalk, use your Query Site ID, to run the query **N_MassPOIChg_MassReorg_Request**. The query will prompt you for a full or partial Department ID. The query will include the following criteria: Sub-Agency, POI, Department ID, Department, Name, Position Number, Jobcode, and Emplid.

When the need arises for use of this report, it is important that you **do not** delete or remove any employees from the report. In order for the CHRIS Staff to process the mass actions, you will need to add one or two columns to the end of the spreadsheet depending on if just the POI is changing or if the Sub-Agency and POI are changing. Label the column **"New POI"** or if appropriate add two columns labeled **"New Sub-Agency"** and **"New POI"** if both the Sub-Agency and POI are changing.

Process Complete

The CHRIS HR Functional Staff will notify the gaining office when the mass NOAC 800 actions have been processed, at which time you should print the SF-50's. Refer to CHRIS HR Users' Manual Section 12.3, "Mass Printing," for instructions on mass SF-50 printing.

14.24 Type of Appointment Codes

Code	Description
10	Career (Competitive Svc Perm)
15	Career-Conditional (Comp Perm)
20	Nonpermanent (Comp NonPerm)
30	Schedule A (Except Svc Perm)
32	Schedule B (Except Svc Perm)
36	Executive (Except Svc Perm)
38	Other (Except Svc Perm)
40	Schedule A (Except Non Perm)
42	Schedule B (Except Non Perm)
44	Schedule C (Except Non Perm)
46	Executive (Except NonPerm)
48	Other (Except NonPerm)
50	Career (Senior Exec Perm)
55	Noncareer (Senior Exec Perm)
60	Limited Term (Senior Exec NonPerm)
65	Limited Emergency (SES Nonperm)

15 CHRIS Help

Contents

- ⇨ **CHRIS Hotline**
  - ⇨ **Functional Support**
  - ⇨ **Technical Support**
  - ⇨ **CHRIS Homepage**

- ⇨ **CHRIS User Accounts**
  - ⇨ **Employee Access (HR Training Workflow Requests)**
  - ⇨ **Approver Access (HR/Training Workflow Requests)**
  - ⇨ **Administrative Access**
  - ⇨ **Points of Contact**

15.2 CHRIS User Accounts

Employee Access (HR/Training Workflow Requests)

Federal employees assigned to an agency that has implemented CHRIS Workflow can request an employee account. To do so, log on to your Employee Self-Service (ESS) account at web address https://mis.doe.gov/ess/. Once logged on, click on **Update**, then click on **Request CHRIS Workflow ID**. Ensure your e-mail address is correct, then click on the **Request Workflow ID** button. Your Workflow user ID and password will be sent to you by e-mail, usually within a couple business hours (Eastern). Note that Security Administration is on an Eastern Time Zone schedule.

Approver Access (HR/Training Workflow Requests)

Employees (Approvers/Managers) responsible for approving HR or or Training Workflow requests must complete the online Workflow User ID Request form, http://chris.inel.gov/Workflow/workflow_request.cfm. Fill in the form, click the **Create Request** button, then print the form, and read and sign the security agreement. Present the signed form to the Workflow point(s) of contact (POC) in your local HR or Training department. The POC will add your employee ID, identify your approval role(s), sign as the authorizing agent, and fax the form to the CHRIS Security Administrators for processing. Your workflow user ID and password will be sent to you by e-mail, usually within a couple business hours (Eastern).

Administrative Access

Administrative access is granted to users whose jobs require them to maintain DOE employee data in support of HR, Benefits, Training, and Manage Competencies, SF 52 Personnel Data Tracking, or Standards of Conduct* functions. Such users must complete the online User ID Request form, http://chris.inel.gov/HR_Admin/user_id_request.cfm. Requestors must fill in the form, click the Create Request button, then print the form, and read and sign the security agreement. Present the signed form to the HR, Training, or Manage Competencies point(s) of contact (POC)*, as applicable, in your local HR or Training department. The POC will add your employee ID, identify your approval role(s), sign as the authorizing agent, and fax the form to the CHRIS Security Administrators for processing. Your user ID and password will be sent to you by e-mail, usually within a couple business hours (Eastern). NOTE: If you are a Workflow and Administrator user, all your access requirements will be granted through a single user ID.

* The only POC for the Standards of Conduct System is in the HQ Office of the General Counsel (GC). GC has a user ID request form specific to the Standards of Conduct system.

Points of Contact

The HR Director (or equivalent) in each subagency is responsible for designating Points of Contact for each of the HR (includes Benefits and SF 52 Data Tracking), Training, or Manage Competencies functions they maintain. The CHRIS/PeopleSoft Security Administrator will provide HR POC guides to those so designated. The guides identify HR POC responsibilities and procedures.

If there are any questions, contact the CHRIS Technical Staff at (304) 285-4729 (voice) or (304) 285-4282 (fax).